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Global Bio-based Polyamide 12 (PA 12) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Bio-based Polyamide 12 (PA 12) market size is expected to reach $ 35.17 million by 2032, rising at a market growth of 8.2% CAGR during the forecast period (2026-2032).

In 2025, global production of bio-based polyamide 12 was approximately 1,800 tonnes, with a global average market price of around $10,200 per tonne. That same year, total global production capacity for bio-based polyamide 12 reached approximately 3,000 tonnes. The average gross profit margin for the industry stood at about 29%. Bio-based polyamide 12 (PA12) refers to a long-chain engineering plastic in which all or part of the carbon source is derived from renewable biomass, yet the molecular structure remains that of polyamide 12. Conventional PA12 is typically produced via the ring-opening polymerization of laurolactam or the polycondensation of 12-aminododecanoic acid; bio-based versions are manufactured by producing the corresponding monomers from biomass-derived olefins, fatty acids, or other renewable platform compounds, or by employing a certified biomass balance approach to allocate renewable feedstock attributes to the PA12 product. Its performance characteristics are essentially identical to those of traditional petroleum-based PA12, featuring low water absorption, good dimensional stability, excellent low-temperature toughness, resistance to oil and fuel, fatigue resistance, and good processability.

The upstream segment of the bio-based PA12 value chain primarily encompasses vegetable oils, waste cooking oils, agricultural and forestry residues, biomass-derived sugar sources, and other renewable carbon feedstocks, as well as the long-chain olefins, fatty acids, laurolactam, or 12-aminododecanoic acid derived from them. Typical technical pathways involve biomass cracking, fermentation, or chemical catalysis to produce intermediates with a 12-carbon backbone, followed by amination, cyclization,

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and purification to obtain polymerization-grade monomers. Some enterprises produce low-carbon PA12 by feeding certified biomass raw materials into existing petrochemical facilities and utilizing a mass balance system. Upstream competitiveness hinges on factors such as renewable feedstock costs, carbon chain selectivity, monomer purity, supply stability, and certification traceability; notably, the stable supply of high-purity laurolactam remains a critical determinant of PA12 polymerization quality and production costs. The midstream segment consists mainly of PA12 resin producers, powder material companies, and engineering plastic compounders. Laurolactam is typically converted into base PA12 resin through ring-opening polymerization, molecular weight regulation, pelletizing, and post-processing; depending on downstream requirements, the resin can be further processed into grades suitable for injection molding, extrusion, tubing, cable sheathing, powder coating, and 3D printing. Manufacturers may also incorporate additives such as glass fibers, carbon fibers, toughening agents, flame retardants, conductive fillers, and heat stabilizers to produce reinforced, wear-resistant, antistatic, or flame-retardant grades. Key midstream technical considerations for bio-based PA12 encompass not only the control of viscosity, color, and batch-to-batch consistency but also bio-based content certification, carbon footprint accounting, and the verification of performance parity with petroleum-based counterparts. For applications such as Selective Laser Sintering (SLS), properties like powder particle size distribution, sphericity, flowability, and recyclability stability are particularly critical. Downstream applications for bio-based PA12 span sectors including automotive, additive manufacturing, electrical and electronics, industrial piping, cabling, sports equipment, and medical devices. In the automotive industry, it is utilized for fuel lines, brake lines, pneumatic tubing, cooling circuits, quick connectors, and cable sheathing. In 3D printing, the powder serves as a vital material for SLS and Multi Jet Fusion (MJF) processes, enabling the production of lightweight, fatigue-resistant parts with complex geometries. In the electrical, electronics, and industrial sectors, it is used for connectors, insulating components, hoses, wear-resistant parts, and powder coatings.

Bio-based Polyamide 12 (PA12) combines low water absorption, excellent dimensional stability, resistance to oil and fuel, low-temperature toughness, and fatigue resistance, making it suitable for applications such as fuel lines, brake lines, pneumatic tubing, battery cooling lines, quick connectors, and cable sheathing. As new energy vehicles increasingly incorporate battery thermal management systems, heat pumps, and high-voltage electrical systems, the demand for lightweight fluid transport components and insulating protective materials within vehicles continues to rise. Bio-based or mass-balanced PA12 reduces fossil carbon input while maintaining the processing characteristics of traditional PA12, facilitating its integration into automotive component

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projects that already possess established certification systems.

PA12 powder—characterized by excellent flowability, a favorable sintering window, toughness, and dimensional stability—is a key material for powder bed processes such as Selective Laser Sintering (SLS), High-Speed ??Sintering (HSS), and Multi Jet Fusion (MJF). As 3D printing expands from prototyping to the production of automotive parts, industrial jigs, medical aids, and small-batch end-use components, the market is increasingly focused on PA12 powders that offer high recyclability, stable particle size distribution, and a lower carbon footprint. Arkema continues to develop Orgasol® PA12 materials for powder bed fusion, prioritizing improvements in powder reusability, surface quality, and production cost-effectiveness.

At present, the large-scale supply of fully bio-based laurolactam remains limited; consequently, the industry is more likely to utilize bio-based, bio-circular, or waste-derived feedstocks in conjunction with existing PA12 production facilities, supplying low-carbon products via a certified mass-balance approach. This model avoids the need to construct entirely new, independent production lines, enabling faster market penetration across the automotive, electrical/electronic, and industrial sectors. Meanwhile, EU policies are placing greater emphasis on the authenticity of bio-based feedstocks, sustainable sourcing, carbon footprints, and recyclability, driving companies to shift from merely promoting "bio-based" claims toward providing traceable feedstocks, life-cycle assessments, and third-party certifications.

Report Scope

This report studies the global Bio-based Polyamide 12 (PA 12) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Bio-based Polyamide 12 (PA 12) and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Bio-based Polyamide 12 (PA 12) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Bio-based Polyamide 12 (PA 12) total production and demand,

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2021-2032, (Tons)

Global Bio-based Polyamide 12 (PA 12) total production value, 2021-2032, (USD Million)

Global Bio-based Polyamide 12 (PA 12) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Bio-based Polyamide 12 (PA 12) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Bio-based Polyamide 12 (PA 12) domestic production, consumption, key domestic manufacturers and share

Global Bio-based Polyamide 12 (PA 12) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Bio-based Polyamide 12 (PA 12) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Bio-based Polyamide 12 (PA 12) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Bio-based Polyamide 12 (PA 12) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Arkema, Evonik Industries, EMS Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Bio-based Polyamide 12 (PA 12) market

Detailed Segmentation:

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Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Bio-based Polyamide 12 (PA 12) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Bio-based Polyamide 12 (PA 12) Market, Segmentation by Type:

Polyamide 12 Base Resin Pellets

Modified Polyamide 12 Granules

Polyamide 12 Powder

Others

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Global Bio-based Polyamide 12 (PA 12) Market, Segmentation by Biobased Content:

Fully Polyamide 12

Partially Polyamide 12

Global Bio-based Polyamide 12 (PA 12) Market, Segmentation by Modification Method:

Unreinforced Polyamide 12

Glass Fiber Reinforced Polyamide 12

Carbon Fiber Reinforced Polyamide 12

Flame Retardant Polyamide 12

Others

Global Bio-based Polyamide 12 (PA 12) Market, Segmentation by Processing Technology:

Injection Molding Grade Polyamide 12

Extrusion Grade Polyamide 12

Blow Molding Grade Polyamide 12

Global Bio-based Polyamide 12 (PA 12) Market, Segmentation by Application:

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Automotive Applications

Industrial Applications

Consumer Goods

Electronics

Others

Companies Profiled:

Arkema

Evonik Industries

EMS Group

Key Questions Answered:

1. How big is the global Bio-based Polyamide 12 (PA 12) market?
2. What is the demand of the global Bio-based Polyamide 12 (PA 12) market?
3. What is the year over year growth of the global Bio-based Polyamide 12 (PA 12) market?
4. What is the production and production value of the global Bio-based Polyamide 12 (PA 12) market?
5. Who are the key producers in the global Bio-based Polyamide 12 (PA 12) market?
6. What are the growth factors driving the market demand?

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